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~~EYES ONLY~~

21 JUL 1965

MEMORANDUM FOR: Executive Assistant to the Director of Personnel
SUBJECT : Annual Report - Fiscal Year 1965

I

Activities for Fiscal Year 1965

The following activities are reported for Fiscal Year 1965 for the Special Activities Staff:

A. CORRECTIVE ACTIONS PROCESSED

(1) During the year approximately 51 employees were placed on probation for a variety of reasons involving performance and/or conduct. In all such cases, warnings or reprimands of some description were issued and in 37 cases, as delineated below, Step Increases were withheld. In assisting offices in placing employees on probation, this Staff reviews each case carefully, advises the office concerned of applicable policies and procedures, and takes the necessary formal action relating to a particular case.

(2) At some time during the year the Step Increases of 37 employees were withheld under the "acceptable level of performance" standard. At the end of the year these cases had been disposed of as follows:

17 - still withheld
9 - granted on a deferred basis after improvement
11 - employees resigned or retired

(3) Twenty-three (23) suspensions for security infractions were processed upon recommendation of the employing offices. In addition, there were two suspensions for other than security reasons. This was approximately the same number as for the preceding year.

(4) There was a substantial increase in the number of change to lower grade cases over the preceding year. Our records show that 71 such cases were processed, 58 of them not involving salary retention and 13 involving salary retention. This is approximately twice the number of cases for 1964.

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NO CHANGE IN CLASS. L1

L1 DECLASSIFICATION

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NEXT REVIEW DATE

AUTH. L1 170-2

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REVIEWED BY ~~02975~~

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GROUPE 1
Excluded from automatic
downgrading and declassification

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(5) During Fiscal Year 1965 there was also a substantial increase in the number of requests for Fitness for Duty examinations. Fifty-eight (58) such requests were reviewed and forwarded to the Office of Medical Services, compared with 36 such requests for the preceding year. Most of these cases require some sort of administrative action following receipt of the medical report.

(6) Ten (10) Notices of Levy involving delinquent Federal income taxes were handled during Fiscal Year 1965. This is two more than in 1964. In addition there were six (6) delinquent State tax cases involving Agency employees. In line with Federal Government policy applicable to such cases, this office cooperates with State tax bodies in these matters, and assists them when delinquent employees do not take prompt action to eliminate these tax delinquencies.

B. INVOLUNTARY SEPARATIONS PROCESSED

(1) Statistical Summary

| | Failed to Qualify | Other Invol. | Total |
|------------------|-------------------|--------------|-------|
| | First Year | Separations | |
| Terminated | 0 | 0 | 0 |
| Resigned in Lieu | 35 | 105 | 140 |
| Retired in Lieu | 0 | 9 | 9 |
| TOTAL | 35 | 114 | 149 |

(2) An additional 31 cases referred by the Office of Security as security disqualifications were resolved by resignation.

C. APPLICANT REVIEW PANEL

(1) During Fiscal Year 1965 the Applicant Review Panel met on an average of once a week and reviewed a total of 354 cases. One hundred and eleven (111) individuals were recommended for approval, 212 cases were rejected or withdrawn, and as of the end of the Fiscal Year 31 cases were deferred for further medical or security review.

(2) As a closely-related activity, the Staff reviewed "white envelope" information submitted by 611 applicants. As a result of this review, processing was discontinued in 82 cases.

D. OVERSEAS CANDIDATE REVIEW PANEL

(1) The Overseas Candidate Review Panel screened a total of [REDACTED] overseas assignment candidates during the period. Of the cases actually discussed by the Panel, 51 persons were considered to be of questionable

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suitability for overseas assignment. Upon further evaluation of the 51, the Panel recommended approval of 45 and disapproval of two (2). Four (4) cases were deferred as of the end of the Fiscal Year for further medical or security review.

(2) The Overseas Panel conducted post mortem reviews in 18 cases. These systematic reviews, augmented by the efforts of the Staff itself, are providing a feedback to the offices and divisions which should prove useful to them in considering future overseas assignments.

E. CIA PERSONNEL EVALUATION BOARD

The CIA Personnel Evaluation Board met 13 times during the Fiscal Year and discussed 25 cases. Personnel Evaluation Board action led to the resignation of 9 employees, the reassignment of 2, disability retirement of 6, probation in 7 cases, with final action still pending in 1 case.

F. SEPARATION COMPENSATION

During the year the Staff processed claims for separation compensation payments from eight (8) former employees. These claims involved a total of \$18,074.80. Two (2) former employees are still claiming separation compensation payments as of 30 June 1965.

G. CONVERSION TO CAREER EMPLOYEE STATUS

During the Fiscal Year the Staff arranged for the conversion to Career Employee status of 507 employees. As of the end of the year 13 employees otherwise eligible for Career Employee status had been reported in a deferred category, in most cases due to some uncertainty as to whether the individual had the potential for Career Employee status. One problem which the Staff has been concerned about relates to the number of delinquent cases, i.e., cases of individuals who, as far as personnel records are concerned, are eligible for Career Employee status but have not been recommended for such status by their career services. Although the total number of such cases was reduced during the Fiscal Year, the number of delinquent cases as of the end of the year stood at 226, 203 of which were DD/P cases. Continuing efforts will have to be made to resolve this situation.

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SUBJECT: Annual Report - Fiscal Year 1965

II

Plans for Fiscal Year 1966 and Fiscal Year 1967

1. The Special Activities Staff supports Agency offices and career services in carrying out their responsibilities in the general area of involuntary separations and disciplinary actions, and provides other special support services, such as processing cases of employees eligible for conversion to Career Employee status. The Staff represents the Director of Personnel in cases which may involve involuntary separation, reduction in grade, suspension or other disciplinary action, and assists in the development and administration of policies relating to such cases. The Staff also conducts liaison with other Agency officials on these matters and approves on behalf of the Director of Personnel personnel actions taken in connection with such cases. Support is provided to the Applicant Review Panel and the Overseas Candidate Review Panel, as well as to the CIA Personnel Evaluation Board.

2. During the forthcoming year it will be necessary to review the Agency regulation and handbook on employee conduct to assure conformance with the new Executive Order on this subject, as well as the Civil Service Commission regulations which are being issued for the purpose of implementing the Executive Order.

3. It will also be necessary to complete the coordination of the proposed involuntary separation regulation [REDACTED], and to pursue the proposed revision of [REDACTED] on Separation Compensation.

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4. Now that the new Form 259a has been approved and received from the printer, the revised procedures for approving the PCS movement of employees to overseas stations must be installed and administered. It is anticipated that these new procedures will not only be a big improvement from the point of view of the divisions assigning personnel overseas, but will simplify and streamline the activities of the support offices concerned.

5. Revised procedures for reviewing the cases of employees eligible for conversion to Career Employee status will require further coordination. It is anticipated that these procedures, if approved, can be installed within the first half of the forthcoming Fiscal Year.

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6. Due perhaps to personnel changes and also to the need for an occasional reminder in such matters, it may be necessary to announce through a notice or other appropriate means, that Agency offices are still obligated to furnish the Director of Personnel with information relating to employee suitability for the special "Eyes Only" file maintained by this Staff. The receipt of such information has been reduced almost to a trickle, and it is obvious on the basis of other information known to the Staff that certain offices are failing to report "Eyes Only" information as required by Agency regulation.

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Chief, Special Activities Staff
Office of Personnel

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13 July 1965

MEMORANDUM FOR: Director of Personnel

SUBJECT : Statement of Accomplishments of the Plans and Review Staff for FY-64 and its Plans and Objectives for FY's-65 and 66

1. The major accomplishments of the Plans and Review Staff during FY-65 were concerned with manpower projections; the continuing development of Career Trainee Officer requirements; the establishment of basic employment categories for use in studies concerned with personnel requirements, attrition, manpower projections and other personnel planning endeavors. Throughout most of the year, until the DD/S changed his reporting structure, this staff was responsible for preparing a Monthly Report of personnel activities to the DD/S.

The staff continued performing its responsibility for conducting studies and reports on other personnel activities and for developing and processing Agency regulatory material.

The staff also continued its special project function concerned with systems analysis and the application of new techniques, materials and equipment to Office of Personnel requirements. For a considerable period of time the staff member most concerned with this function was detailed to assist with the establishment of the CIA Retirement and Disability System and with the development of a total automatic data processing system for the Office of Personnel.

2. Plans and Review Function

Accomplishments under this function were as follows:

- A basic background paper concerning the reemployment of annuitants was prepared showing comparative features of the Civil Service, Foreign Service, Military and CIA Systems.
- A detailed cost analysis of retirement for the first four and one-half years under the CIA Retirement and Disability System was prepared. This study projected retirements by numbers, grade and by comparative cost with the Civil Service System.
- Negotiated with and responded to the Social Security Administration re their request for information regarding retirements under the CIA Retirement and Disability System.
- The staff analyzed and presented comments on briefing material prepared on the CIA Retirement and Disability System.
- A comparative value chart between CIA and Civil Service annuities was prepared.

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SUBJECT: Statement of Accomplishments of the Plans and Review Staff for FY-64
and its Plans and Objectives for FY's-65 and 66

- Participated in the development of a response to the White House re the implementation of the Civil Rights Act.
- Responded to the Inspector General's recommendation re increasing the contribution of the Assessment and Evaluation Staff to personnel operations and prepared comments re his survey of the Office of Personnel.
- A review and analysis was made and comments prepared on a proposal on indirect travel.
- Prepared comments on a bill proposed by the General Services Administration which would establish a Federal Parking System.
- Participated in a study concerned with ceiling accounting for rotational overlaps.
- Prepared a paper giving policies and guidelines for use in the re-employment of staff personnel.
- Participated in the development of a statistical reporting system for non-staff personnel.
- A review and analysis of the separation compensation practices of other agencies and industry was made and a CIA regulation on this subject was developed.
- Responded to suggestions and questions re the Agency's Fitness Reporting System and prepared comments on an article appearing in the Harvard Business Review on performance and evaluation.
- A study was completed on the Agency's career selection process and recommendations were made for its improvement.
- The procedures of the Honor and Merit Awards Board were reviewed and analyzed and recommendations were made for their improvement.
- An Honor and Merit Awards Study was completed which covered:
 - : Agency precedents and practices.
 - : The practices and precedents of other organizations.
 - : The development of a portfolio for Members and Alternates of the Honor and Merit Awards Board.

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- : A proposed revision of the Honor and Merit Awards regulation.
- : The initiation of action to have President Kennedy's Executive Order on the Purple Heart amended so that Agency personnel will be eligible under all cover circumstances.
- At the request of the DD/S a study was completed which examined the extent to which the CT Program was meeting the recruitment objectives established by the DDCI on 5 March 1964.
- A five year personnel replacement projection was prepared for the Agency and each of the major directorates in accordance with the following employment categories:
 - Professional - CT
 - Professional - Other
 - Clerical
 - Technical - Commo
 - Technical - Other
 - Wage Board
 - Military
- An analysis of the 1965 Amendments of the Foreign Service Act was made and the Chief of the Staff is responsible for monitoring their progress in the Congress.
- A policy statement was developed covering leave for purposes of medical examination.
- A comprehensive systems analysis was conducted of the accounting phases of health benefits insurance programs administered by the Insurance Branch and a new unified transaction system designed and installed. The new system has a more positive linkage with current computer operated accounting systems, provides a distinct hospitalization record master, and clearly differentiates the responsibilities between the Office of Personnel, the Office of Finance, and the Office of Computer Services.
- Direct assistance was given to the CIA Retirement Staff on the development of procedures, forms, and the design and programming of a master transaction and record system for the new CIA Retirement and Disability System.
- The Deputy Chief of the Staff planned, organized and ran the Personnel Officer's Conference.

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- The staff conducted liaison with the Civil Service Commission and the Department of State. The Chief, Plans and Review Staff served as Executive Secretary of the CIA Personnel Advisory Board. He also served as the Personnel representative to the Long-Range Planning Group and as a member of the task force which developed a statistical reporting system for non-staff personnel.

3. Reporting Function

The staff prepared the Director of Personnel's Monthly Report to the DD/S until it was discontinued and other reporting arrangements made toward the end of the fiscal year. The Monthly Report contained:

- : highlights that occurred during the month.
- : a statement re the principal activities of the Divisions and Staffs of the Office of Personnel.
- : a statement of anticipated activities or events, and
- : usually a special report on some phase of personnel management.

The following Special Reports were prepared during this year:

- Sick Leave Usage
- Midcareer Executive Development Course
- CIA Honor and Merit Awards
- Foreign Language Skills of Agency Staff Personnel

4. Regulations Function

The major accomplishments of the Regulations function were:

- preparation of a new Regulation on Casualty Planning for Certain Activities and processing of revisions to Regulations on Consultants, Honor and Merit Awards, and Hours of Work.
- processing of Notices on Cover and Security Considerations for Participation in Employee Activity Association, Legislative Pay Increase for Certain Contract Personnel, Processing of Candidates for PCS Assignment Overseas, and Flight and Accident Policy.

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- preparation of a new Handbook on Hours of Work, and major revisions to Handbooks on Contract Personnel and Credit Union Fact Book-Field Activities.
- preparation of a new Information Brochure entitled Employee Handbook.
- completion of the project to convert Agency Personnel Regulations to the new numbering system.
- general revamping of Office of Personnel Memorandums to include the rescission of obsolete issuances, the updating of those which prescribe procedures currently in effect, and the development of a numbering system which corresponds to Agency regulations.

The Fiscal Year 1965 Regulations function accomplishments are as follows:

| | |
|---|----|
| Headquarters Regulations Processed | 24 |
| Headquarters Handbooks Processed | 4 |
| Headquarters Notices Processed | 23 |
| | |
| 25X1A | 11 |
| | 4 |
| | 7 |
| | |
| Messages from DCI or DDCI Processed | 3 |
| | |
| Headquarters Employee Bulletins Processed | 4 |
| | |
| Office of Personnel Memoranda Processed | 12 |
| | |
| Information Brochures Processed | 1 |

5. Program plans and objectives for Fiscal Years 1966 and 1967 are as follows:

a. Fiscal Year 1966

- Continued emphasis will be given to manpower studies on an Agency, Career Service and employment category basis. Working relationships with the manpower unit of the Office of the Executive Director-Comptroller which have been developed will be continued and expanded.

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The employment categories established in the preceeding fiscal year will be used as the basic groups around which recruitment, attrition, manpower projection and other studies will be centered.

Continuing and Ad Hoc studies will be conducted in various fields of personnel management.

The program to revise and bring up to date Personnel Regulations and Handbooks will be continued.

- It is expected that the program started last year to update Office of Personnel Memorandums will be completed during the fiscal year.
- One member of the staff is expected to be continued on a full-time detail to a task force engaged in developing a total automatic data processing system for the Office of Personnel which will be integrated and compatible with systems of other DD/S components.

6. Projection - Fiscal Year 1967

Continuation of the objectives set forth for Fiscal Year 1966.

7. It is anticipated that operations will decrease to some extent in Fiscal Year 1966 and will increase to about the same level in Fiscal Year 1967 as was budgeted for Fiscal Year 1965.



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Chief, Plans and Review Staff
Office of Personnel

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